



Manage Enclosure Documents for Requirements Package



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Lesson Objectives

- **Objective:**
 - **Upon completion of this lesson the customer will be able to:**
 - Download enclosure templates and upload enclosure documents to IDEAS.
 - Review enclosure documents through *Enclosure Documents Dashboard*.

The Requirement Package can be accessed from *"My Requirements"* on the *Landing Page*.

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Indah Customer

My Requirements

Actions

[Enter New Requirement](#)

My Tasks

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Task	Requirement #	Received	Assigned To
Respond to Correspondence from Chris BurgoyneCB for Requirement A000689		9/1/2015 11:13 AM EDT	Indah Customer
Respond to Correspondence from Indah Customer for Requirement A000476		6/4/2015 2:29 PM EDT	Indah Customer
Update Correspondence for Requirement A000442		9/26/2015 2:13 PM EDT	Indah Customer
Respond to Correspondence from Indah CBO Only for Requirement A000437		9/17/2015 10:51 PM EDT	Indah Customer
Respond to Correspondence from Indah Gess_CB for Requirement A000419		9/15/2015 10:56 AM EDT	Indah Customer
Respond to Correspondence from Indah Gess_CB for Requirement A000361		4/13/2015 12:43 PM EDT	Indah Customer
Respond to Correspondence from Indah Gess_CB for Requirement A000361		4/9/2015 10:34 PM EDT	Indah Customer
Respond to Correspondence from Indah Gess_CB for Requirement A000333		4/8/2015 3:03 PM EDT	Indah Customer
Update Correspondence for Requirement A000227		4/1/2015 1:10 PM EDT	Indah Customer
Review Correspondence from Indah Gess_CB for Requirement A000227		3/13/2015 3:43 PM EDT	Indah Customer
Review Correspondence from Indah Customer for Requirement A000527		1/19/2015 10:22 AM EST	Indah Customer
Review correspondence from Indah Gess_CB for Requirement A000058		9/24/2014 1:10 PM EDT	Indah Customer
Review correspondence from Indah Gess_CB for Requirement A000058		9/24/2014 12:01 PM EDT	Indah Customer
Review correspondence from Indah Gess_CB for Requirement A000058		9/24/2014 12:00 PM EDT	Indah Customer

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My Requirements

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[Export](#)

Procurement Object	Identifier	Requirement Number	Status	Contract Specialist	Contracting Officer	Contracting Office	Created Date
Requirement	A000020		Validated				9/22/2015 8:53 AM EDT
Requirement	A000018		Assigned/Accepted	Chris BurgoyneCB	Chris BurgoyneKO	PLS11	9/21/2015 9:00 PM EDT
Requirement	A000017		Assigned/Accepted	Chris BurgoyneCB	Chris BurgoyneKO	PLS11	9/21/2015 4:59 PM EDT
Requirement	A000016		Assigned/Accepted	Chris BurgoyneCB	Chris BurgoyneKO	PLS11	9/21/2015 4:41 PM EDT
Requirement	A000015		Validated				9/21/2015 3:46 PM EDT
Requirement	A000014		Validated				9/21/2015 3:32 PM EDT
Requirement	A000012		Validated				9/21/2015 2:56 PM EDT
Requirement	A000011		Validated				9/21/2015 2:10 PM EDT
Requirement	A000008		Validated				9/21/2015 12:24 PM EDT
Requirement	A000007		Assigned/Accepted	Indah Gess_CB	Indah Gess_KO	PLS11	9/21/2015 9:49 AM EDT

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Related Actions: Manage Enclosure Documents

From *Related Actions*, click **“Manage Enclosure Documents”** to upload Enclosure Documents.



Summary

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Related Actions ▶

Funding Information

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A000234 - MH-Training A



Update Requirement



Manage Funding



Manage Enclosure Documents



Submit Requirement to Contracting



Download Requirement Package Templates



Delete Requirement



Manage Enclosure Documents Form

- Click **“Add”** to upload new *Enclosure Documents*.
- Click **“New Version”** to indicate you want to upload a new version of a document.
- Click **“Delete”** to remove a document that is no longer needed.
- Click **“Close”** when done with this form.

Manage Enclosure Documents for A000320

Add

New Version

Delete

<input type="checkbox"/>	Document	Enclosure Type	Size	Version	Modified By	↓	Modified On
No items available							

Close



Manage Enclosure Documents Form (cont.)

- Click an **“Enclosure Type”** from the dropdown menu.
- Click **“Browse”** (under *“Upload Document”*) to navigate to a document on your computer to be uploaded to the IDEAS system. Once the document is uploaded, IDEAS presents a dynamic text box that gives you the option of renaming the document. (See next slide.)
- Click **“Save”** to save the document to IDEAS or click **“Cancel”** to cancel the uploading of the document.

Manage Enclosure Documents for A000320

Add
New Version
Delete

	Document	Enclosure Type	Size	Version	Modified By	↓	Modified On
No items available							

Enclosure Type*

-- Select One --

Select the enclosure template that matches your uploaded document

Upload Document*

Browse_
No file selected.

Save
Cancel



Manage Enclosure Documents Form (cont.)

- Now that you have uploaded an Enclosure Document, you have the option of renaming it.
- Under “*New File Name*”, type a **new name** to save the file using a different name.
- Click “**Save**” to save the document to IDEAS or click “**Cancel**” to stop its being uploaded.

Manage Enclosure Documents for A000320

	Document	Enclosure Type	Size	Version	Modified By	↓	Modified On
No items available							

Enclosure Type*

Encl 3 Statement of Work (SOW)

Select the enclosure template that matches your uploaded document

Upload Document*

test.txt (3.7 KB) [Remove](#)

New File Name

SOW Document

If you would like to save the file under a different name, please type that name here.



Manage Enclosure Documents Form (cont.)

- To continue to upload Enclosure Documents, click **“Add”** and follow the same process.
- Click **“Close”** to exit once you have completed uploading all Enclosure Documents.

Manage Enclosure Documents for A000320

[Add](#)[New Version](#)[Delete](#)

<input type="checkbox"/>	Document	Enclosure Type	Size	Version	Modified By	↓	Modified On
<input type="checkbox"/>	SOW Document	Encl 3 Statement of Work (SOW)	3.7 KB	1	Midge CI		12/2/2014 1:55 PM GMT+00:00

[Close](#)



Enclosure Documents Dashboard Link

- Under “*Related Actions*”, click the “**Enclosure Documents**” Dashboard link to view all uploaded Enclosure Documents.



Summary

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Update Requirement



Manage Funding



Manage Enclosure Documents



Submit Requirement to Contracting



Download Requirement Package Templates



Delete Requirement



Enclosure Documents Dashboard

- The “*Enclosure Documents*” Dashboard displays the names of the uploaded Enclosure Documents with a link to open and view each one.
- Under “*Approved?*” IDEAS can indicate if the Contract Specialist has approved the document.

[Records / Requirements](#)

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Enclosure Documents

Document	Enclosure Type	Size	Version	Modified By	↓	Modified On	Approved?
SOW Document	Encl 3 Statement of Work (SOW)	3.7 KB	1	Midge CI		12/2/2014 1:55 PM GMT+00:00	<input type="radio"/>



Summary

- **In this lesson you learned how to:**
 - **Upload Enclosure Documents.**
 - **Review the Enclosure Documents Dashboard.**



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